

# Invitation to Bid

## City of Milwaukee

CITY OF MILWAUKEE  
200 E WELLS STREET  
MILWAUKEE WI 53202  
United States

CIMIL

**Vendor:** 0001030455  
WEBPAGE DOWNLOAD  
<http://www.milwaukee.gov/citygov/daa/sp/sp.shtml>  
MILWAUKEE WI 53202

Bid ID	Date	Buyer	Page
CIMIL-0000002127	05/14/2008	Michael Drzewiecki	1
Payment Terms	DateTime Bid Open	Closing	
PROMPT PAY	05/20/2008 03:00 PM	07/01/2008 02:00 PM	

**Ship To:** See Detail Below

**Bill To:** COMPTROLLER 2110  
200 E Wells St Rm 404  
Milwaukee WI 53202-3560  
United States

Line	Item	Description	Mfg ID	Mfg Item ID	Quantity	UOM	Need Date
1		SC FOR UTILITY BILL AUDIT SERVICES			1.0000	SER	

**Freight Terms:** DEST **Ship Via:** NOT APPL

REQUEST FOR PROPOSAL (HEREINAFTER RFP) TO AWARD A SERVICE CONTRACTS FOR UTILITY BILL AUDIT SERVICES IN ACCORDANCE WITH SCOPE OF SERVICES FOR UTILITY BILL AUDIT SERVICES DATED MAY 14, 2008 FOR A PERIOD OF THREE YEARS FROM DATE OF AWARD WITH THE OPTION TO EXTEND FOR TWO ADDITIONAL ONE YEAR PERIODS UPON MUTUAL CONSENT.

NOTE: QUESTION REGARDING THIS RFP MUST BE SUBMITTED NO LATER THAN JUNE 10, 2008. REFER TO SECTION 2.4 FOR ADDITIONAL DETAILS. ALL QUESTION SUBMITTALS MUST MAKE REFERENCE TO RFP 0000002127.

AWARD WILL BE MADE TO THE HIGHEST RANKED PROPOSER(S) BASED ON THE FOLLOWING AWARD CRITERIA:

- COMPLIANCE WITH PROPOSAL SUBMITTAL REQUIREMENTS: PASS / FAIL
- PROPOSED PROJECT TEAM QUALIFICATIONS AND EXPERIENCE: 40 POINTS
- AUDIT APPROACH: 30 POINTS
- COMPENSATION (COST PROPOSAL): 30 POINTS\*
- EBE PARTICIPATION: PROPOSERS CAN RECEIVE UP TO 10 ADDITIONAL POINTS FOR UTILIZING A CERTIFIED CITY OF MILWAUKEE EBE SUBCONTRACTOR TO PERFORM A PORTION OF THE REQUIRED WORK. SEE PAGE 4 OF THE SCOPE OF SERVICES FOR ADDITIONAL DETAILS:

\* ALL DOCUMENT COPIES PERTAINING TO COMPENSATION (COST PROPOSAL) SHALL BE SUBMITTED IN A SINGLE CLEARLY MARKED SEALED ENVELOPE. SEE PAGE 4 OF THE SCOPE OF SERVICES FOR ADDITIONAL DETAILS.

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A THREE (3) YEAR CONTRACT FROM DATE OF AWARD SUBJECT TO ANNUAL REVIEW BY THE CITY WITHIN SIXTY (60) DAYS OF THE ANNIVERSARY DATE WILL BE AWARDED TO THE HIGHEST RANKED PROPOSER(S). THE CONTRACT OR CONTRACTS WILL ALSO BE SUBJECT TO TWO ONE YEAR EXTENSIONS UPON MUTUAL CONSENT. CONTRACT CONTINUANCE BEYOND DECEMBER 31ST FOR ANY YEAR IS CONTINGENT UPON THE APPROPRIATION OF SUFFICIENT FUNDS BY PROPOSER CITY OFFICIALS.

PROPOSERS SHALL QUOTE A FEE FOR SERVICES AND / OR THE QUOTE A CONTINGENT FEE FOR YEARS 2008, 2009 AND 2010. SEE PAGES 3 AND 4 OF THE SCOPE OF SERVICES FOR ADDITIONAL DETAILS. THESE QUOTED FEES MUST BE FIRM FOR THE INITIAL THREE YEAR TERM OF THIS CONTRACT.

\*\*\*\*\*

SIGNATURES REQUIRED:

PROPOSERS ARE REQUIRED TO SIGN THE FIRST PAGE OF THE RFP, THE BINDING SIGNATURE PAGE (LAST PAGE OF THE RFP), THE COVER LETTER, ANY AND ALL ADDENDUM'S (UNLESS ADVISED OTHERWISE), EBE FORMS A AND B (IF APPLICABLE), THE DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION, AND THE COST PROPOSAL DOCUMENT (FEE FOR SERVICES AND / OR CONTINGENT FEE). BY SIGNING AND SUBMITTED THESE PAGES AND DOCUMENTS, PROPOSERS HEREBY AGREE TO ALL OF THE TERMS AND CONDITIONS OF THESE DOCUMENTS AND THOSE CONTAINED IN THE FOLLOWING LISTING OF CITY OF MILWAUKEE DOCUMENTS:

- TERMS AND CONDITIONS FOR RFP'S FOUND IN THE BID INFORMATION SECTION OF THE PROCUREMENT SERVICES SECTIONS WEBPAGE.
- TERMS AND CONDITIONS FOR SERVICE CONTRACTS FOUND IN THE BID INFORMATION SECTION OF THE PROCUREMENT SERVICES SECTIONS WEBPAGE.

INSURANCE REQUIREMENTS FOUND IN THE FORMS SECTION OF THE PROCUREMENT SERVICES SECTIONS WEBPAGE.

- BIDDERS ARE, HOWEVER, REQUIRED TO PROVIDE ALL OF THE RFP PAGES WITH THEIR PROPOSAL SUBMITTAL.

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### NOTES:

- ONLY THE SUCCESSFUL PROPOSER(S) IS/ARE REQUIRED TO SUBMIT A COPY OF THEIR INSURANCE CERTIFICATE CONTAINING ORIGINAL SIGNATURES ACCOMPANIED BY A COPY OF OUR REQUIRED AFFIDAVIT OF NO INTEREST WITH ORIGINAL SIGNATURES AND NOTARY STAMP. THE INSURANCE CERTIFICATE AND AFFIDAVIT OF NO INTEREST MUST BE IN FULL COMPLIANCE WITH THE CITY'S INSURANCE REQUIREMENTS.

- THE INSURANCE CERTIFICATE AND AFFIDAVIT MUST BE RECEIVED BY THE DOA, BUSINESS OPERATIONS DIVISION, PROCUREMENT SERVICES SECTION WITHIN TEN DAYS OF RECEIVING NOTIFICATION OF AWARD. FAILURE TO PROVIDE A FULLY COMPLIANT INSURANCE CERTIFICATE AND AFFIDAVIT OF NO INTEREST WITHIN TEN DAYS OF AWARD MAY RESULT IN THE WITHDRAWAL OF THE AWARD OF THIS RFP.

- THE SUCCESSFUL PROPOSER(S) ARE TOTALLY RESPONSIBLE FOR MAINTAINING PROPER INSURANCE COVERAGE FOR THE DURATION OF THE CONTRACT AND PROVIDING THE DOA, BUSINESS OPERATIONS DIVISION, PROCUREMENT SERVICES SECTION WITH UPDATED INSURANCE CERTIFICATES AND AFFIDAVITS OF NO INTEREST PRIOR TO THE EXPIRATION DATE OF THE PREVIOUSLY SUPPLIED DOCUMENTS. FAILURE TO MAINTAIN THE REQUIRED COVERAGE OR TO PROVIDE UPDATED DOCUMENTS AS STATED HEREIN MAY RESULT IN INVOICE PAYMENT DELAYS AND/OR CONTRACT CANCELLATION.

- ALL OF THESE FORMS AND THOSE REFERENCED IN THE RFP ARE HEREIN REFERENCED AND INCORPORATED AS PART OF ANY CONTRACT(S) THAT IS/ARE AWARDED AS PART OF THIS RFP.

IF YOU HAVE TROUBLE DOWNLOADING ANY OF THE REFERENCED DOCUMENTS, COPIES CAN BE OBTAINED BY CALLING OUR OFFICE AT 1-414-286-3501.

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### REQUEST FOR PROPOSAL (RFP)

NOTE: EFFECTIVE DECEMBER 28, 2005, THE CITY OF MILWAUKEE ADOPTED AN ORDINANCE RELATIVE TO THE DISCLOSURE OF PARTICIPATION IN OR PROFITS DERIVED FROM SLAVERY BY CONTRACTORS. ALL CONTRACTORS AWARDED A CONTRACT ON BEHALF OF THE CITY OF MILWAUKEE, WHETHER OR NOT SUBJECT TO A COMPETITIVE BID, SHALL COMPLETE AN AFFIDAVIT PRIOR TO ENTERING INTO THE CONTRACT VERIFYING THAT THE CONTRACTOR HAS SEARCHED ANY AND ALL RECORDS OF THE COMPANY OR ANY PREDECESSOR COMPANY REGARDING RECORDS OF INVESTMENTS OR PROFITS FROM SLAVERY OR SLAVEHOLDER INSURANCE POLICIES DURING THE SLAVERY ERA. THE NAMES OF ANY ENSLAVED PERSONS OR SLAVEHOLDERS DESCRIBED IN THOSE RECORDS MUST BE DISCLOSED IN THE AFFIDAVIT.

THE CITY SHALL MAKE THE INFORMATION CONTAINED IN THE AFFIDAVIT AVAILABLE TO THE PUBLIC. ANY CONTRACT BETWEEN THE CITY AND A CONTRACTOR WHICH FAILS TO PROVIDE THE REQUISITE AFFIDAVIT OR WHICH INCLUDES MATERIAL FALSE INFORMATION ON SUCH AFFIDAVIT SHALL BE RENDERED NULL AND VOID. TO REFERENCE MILWAUKEE CODE OF ORDINANCES 310-14, PLEASE SEE:

<http://CC-CODENEW.MILWAUKEE.GOV/CODE/VOLUME3/CH310.PDF>

The City strives to make timely payment on all invoices. Payment to the vendor will be deemed timely if the payment is mailed, delivered, or transferred within 60 calendar days after receipt of a properly completed invoice or receipt and acceptance of the property or service under the order or contract, whichever is later. If the City does not make payment by the 60th calendar day, the City shall pay simple interest beginning with the 31st calendar day at the rate of one percent per month (unless the City disputes the amount of the invoice). Reference Common Council File No. 900859 adopted October 16, 1990, Provisions of State Statute 66.285 and 66.286.

If this Request for Proposal has subcontractor requirements, the prime contractor must pay the subcontractor(s) within ten (10) working days of the contractor's receipt of payment from the City of Milwaukee, or ten days from receipt of a properly submitted and approved invoice from the subcontractor, whichever is later. If the contractor fails to make timely payment to a subcontractor, the contractor shall pay simple interest at the rate of one percent (1%) per month, beginning with the 11th calendar day.

Proposers are requested to state their best cash discount on the line below for payment made within thirty (30) days following receipt and acceptance of this service. Cash discounts offered by the Proposers, ONLY if payment terms are

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thirty (30) days or more, may be considered in determining the cost of your proposal. However, if the Proposer who is awarded this contract has quoted a more favorable discount for earlier payment, and the City pays within that earlier timeframe, the Proposer will be held to that quoted discount.

\_\_\_\_\_ % \_\_\_\_\_ days

Sealed Proposals, the original and the specified required number of copies, for furnishing services, work, material, labor, or material and labor combined as specified above will be received in the Office of the Business Operations Division, Procurement Services Section, Room 601, City Hall, 200 E. Wells Street, Milwaukee, Wisconsin 53202 no later than 2:00 p.m. of the closing date specified in the upper right-hand corner of page one of this RFP. Your envelope must be plainly marked in the lower left-hand corner of the envelope as follows:

RFP #: 0000002127

RFP DESCRIPTION: SERVICE CONTRACT FOR UTILITY BILL AUDIT SERVICES

CLOSING DATE AND TIME: JULY 1, 2008 AT 2:00 PM

Any proposal received in an envelope not properly and clearly marked as specified above will result in the proposal being rejected. Eight copies (one clearly marked bound original, six clearly marked bound copies, and one clearly marked unbound copy of your proposal must be submitted. Your proposal must be signed (manually) to be considered (Facsimiles are not acceptable). Proposals received after the date and time specified above will be rejected and returned.

NOTE: All proposals, the original and required number of copies specified above, must be time stamped in Room 601, City Hall, by 2:00 p.m. on the closing date. Proposal opening will be in Room 301C of City Hall at 2:30 p.m. The names of firms submitting proposals will be publicly read and will be the only information available at that time.

PROPOSALS WILL BE MADE AVAILABLE FOR REVIEW ONLY AFTER ALL INTERVIEWS HAVE BEEN CONDUCTED AND A CONTRACT HAS BEEN FULLY EXECUTED.

### IMPORTANT!

Your proposal is an offer to perform or supply the service or materials described above in accordance with the terms and conditions set forth in the RFP, the Standard Terms and Conditions, and the City of Milwaukee Contract.

Your proposal must meet the plan(s) or scope of services set forth herein. Proposals must be submitted on the forms provided with attachments as applicable.

PERFORMANCE BOND REQUIRED: \$ N/A

### ATTACHMENTS:

- 1) Request for Proposal RFP)
- 2) Scope of Services
- 3) Cost Proposal - Attachment A
- 4) EBE Form A
- 5) EBE Form B

The undersigned Proposer, by its authorized person signing below, proposes to furnish the services, work, material, labor, or material and labor combined described above at the prices named above in accordance with the plans and the terms and conditions as set forth in the RFP, the Standard Terms and Conditions, the CITY contract, and if its Proposal is accepted, the Proposer agrees to all provisions set forth herein will become binding as part of a contract upon the fulfillment of all conditions precedent set forth herein. Proposer further assures that, if the Proposer's performance is contingent upon the acts of another party, the Proposer has the necessary commitment to complete the contract.

PERFORMANCE OR DELIVERY: Time is of the essence for all terms of the Contract. Performance or Delivery is as

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specified within the RFP.							

GUARANTEED PERFORMANCE OR DELIVERY: Failure of the Contractor to adhere to the performance or delivery schedule as specified, shall render the Contractor liable for the difference between the "open market" and the contract price.

In signing and submitting this proposal, the Proposer assures the City of Milwaukee that the Request for Proposal, the Proposal, the Standard Terms and Conditions, and the City Contract have been read and understood, and that the furnishing of the subject service work, material, labor, or material and labor combined, is under Proposer control subject to the terms and conditions outlined in the above documents. If the Proposer's performance is contingent upon the acts of another party, the responder assures that they have the necessary commitments to complete the contract which may be awarded to them.

CONTRACTOR agrees that they will comply with all applicable requirements of the AMERICANS with DISABILITY ACT of 1990, 42 U.S.C. 12101, et seq.

IMPORTANT! PLEASE READ ALL INSTRUCTIONS CAREFULLY.

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CITY OF MILWAUKEE  
Department of Administration  
Business Operations Division  
Procurement Services Section

**BINDING SIGNATURES FOR REQUESTS FOR PROPOSAL**

Upon award and acceptance of this bid by the City of Milwaukee, the undersigned bidder, by its authorized persons signing below, agrees that all provisions set forth herein will become binding as a formal contract upon the fulfillment of all conditions precedent set forth herein.

This agreement constitutes the entire agreement between the parties relating to the subject matter of this agreement. All prior understandings, agreements, correspondence and discussions of the parties are merged into and made a part of this agreement.

**CONTRACTOR (To be signed by two persons authorized to legally bind your firm to this contract)**

Bidder's Firm \_\_\_\_\_

Address \_\_\_\_\_

City/State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_

Fax number \_\_\_\_\_

E-mail \_\_\_\_\_

Federal ID # \_\_\_\_\_

BY: \_\_\_\_\_  
(manual signature required)

NAME \_\_\_\_\_  
(typed or printed)

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

BY: \_\_\_\_\_  
(manual signature required)

NAME \_\_\_\_\_  
(typed or printed)

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

Witnesses: Two Witnesses to Bidder's Authorized Signature

BY: \_\_\_\_\_  
(manual signature required)

NAME \_\_\_\_\_  
(typed or printed)

BY: \_\_\_\_\_  
(manual signature required)

NAME \_\_\_\_\_  
(typed or printed)

**This section must be fully completed and witnessed in order to process your bid.**

**FOR OFFICIAL CITY USE ONLY**

CITY OF MILWAUKEE, a municipal corporation

BY \_\_\_\_\_  
City of Milwaukee Purchasing Director

DATE \_\_\_\_\_

Countersigned:

BY \_\_\_\_\_  
City Comptroller

DATE \_\_\_\_\_